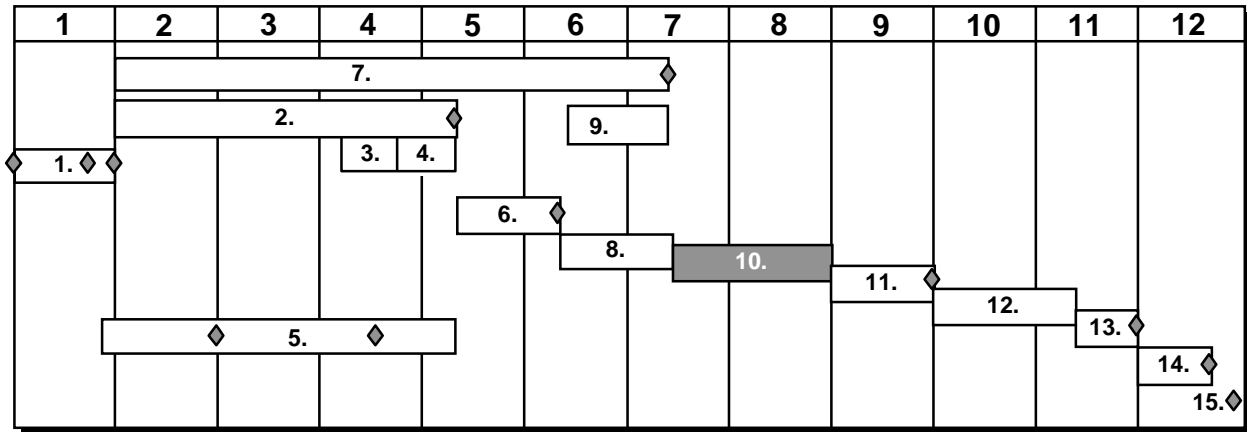


STEP 10: EVALUATE PROPOSALS

10.1 OVERVIEW



◆ Major Milestone Event

The purpose of this step is to evaluate contractor offers and select the offer that will be compared to the government proposal (this comparison is performed in Step 14). If the contracting officer determines that there are no deficiencies, uncertainties, or suspected mistakes concerning each offeror's proposal, then discussions with offerors are not necessary and the contracting officer selects the best value contractor proposal. *In this case, Steps 11 and 12 are skipped* and the selection of the best value contractor proposal is documented and approved in Step 13. To expedite the procurement process, it is desirable to make the best value contractor selection without discussions or requests for Best and Final Offers (BAFO). However, if the contracting officer determines that discussions are necessary before the best value proposal can be selected, a prenegotiation clearance memorandum is prepared (Step 11) and discussions must be held (Step 12) before making the best value selection.

process, the Commanding Officer should limit the number of personnel assigned to the Source Selection Board.

Four parties perform the majority of the effort in evaluating offers. The contracting officer has overall responsibility for managing the acquisition function. A technical evaluation panel—appointed by the Commanding Officer and convened by the contracting officer—conducts an evaluation of the technical proposal. A Source Selection Board (SSB) — appointed by the Commanding Officer—reviews the panel's findings as a quality check. The Source Selection Authority (SSA), who may not be involved in the development of the government IHCE, concurs with the panel's and SSB's recommendation, or, requires reconsideration of other choices. Activities in this step are governed by the Federal Acquisition Regulation (FAR), Defense Federal Acquisition Regulation Supplement (DFARS), Navy acquisition instructions and by OMB Circular Number A-76 and the A-76 Supplemental Handbook.

CO Tip: To expedite the source selection

CO Tip: The technical evaluation of proposals

has historically been a major bottleneck in the procurement process. The Commanding Officer should be aware of several issues that might create obstacles. Members of the technical evaluation panel must be assigned full time to this step and relieved of all other duties for the period of their participation on this panel. To minimize interruptions, the panel members should work together at a location away from their normal working spaces. The technical evaluation function can be supported by OSO or contract with private industry.

It should be noted that SSBs and SSAs are generally used for large procurements, but Commanding Officers have the discretion to use them for smaller procurements as well. If appointment of an SSA is determined to be unnecessary for a particular procurement, the contracting officer performs the functions of the SSA. Commanding Officers should ensure that members of one panel (e.g., Source Selection Board or CA team) do not participate on other panels (e.g., technical evaluation panel) for the same procurement.

CO Tip: To facilitate the timely completion of the source selection process, the Commanding Officer should ensure that the contracting officer conducts the preliminary cost evaluation of contractor proposals at the same time the technical evaluation panel assesses technical proposals.

Government employees who review, approve, or have direct knowledge of the final PWS, performance standards, MEO, IHCE, or contract cost estimates are considered procurement officials and are precluded from accepting employment with a contractor for a period of 2 years if a contract is awarded as a result of the cost comparison process. Questions about employment rights should be directed to legal counsel and the HRO.

The evaluation process begins with the contracting officer ensuring that no offeror is

listed on the government's debarred or suspended bidders list. The contracting officer may also conduct a check of each offeror's financial status with information provided by DCAA and/or publicly available from other sources. The contracting officer then reviews the technical proposals to ensure that no cost data is included. Next, the contracting officer calls and convenes the technical evaluation panel that evaluates the merit of the technical proposals. The contracting officer discusses the solicitation with the panel and may conduct training tailored to the particular solicitation in preparation for the evaluation of technical proposals. The government's legal counsel may also meet with the panel to discuss the statutory and regulatory requirements for the solicitation. The source selection plan developed in Step 6, and prepared by the CA team in accordance with FAR 15.604(b) should define the technical and past performance requirements related to the source selection process. The source selection plan provides the criteria by which the technical evaluation panel evaluates the technical proposals. Sections L and M of the solicitation describe these criteria.

While the technical evaluation panel is conducting its assessment of the technical proposals, the contracting officer conducts a preliminary check to ensure the accuracy of calculations made in the cost proposals. The contracting officer may request that DCAA perform a rate check or provide other background financial data that substantiates the cost information included in each offeror's cost proposal.

After the panel has completed its evaluation, the SSB convenes and either concurs with the panel's choice or directs reevaluations.

The contracting officer arranges for legal counsel to review all source selection documents to ensure their compliance with statutory and regulatory acquisition requirements.

The contracting officer then groups the offers into a competitive range. Offerors that submitted offers that are determined to be outside this competitive range—based on price or on the technical proposal—may be notified of their elimination from consideration. If discussions with offerors are unnecessary, the contracting officer will select the best value offer and forward it to the SSA for approval. The contracting officer documents this selection in Step 13.

CO Tip: Notification to an offeror that its offer is outside the competitive range is a point in the procurement process where a protest might be lodged. To reduce the chances of a disappointed bidder protest, the contracting officer should personally debrief offerors that have been determined to be outside the competitive range to explain clearly why such offers were excluded from further consideration.

It is essential that the Commanding Officer, members of the SSA and SSB, and any others who are engaged in the procurement process protect the integrity of the source selection process. Maintaining the integrity of the source selection process entails ensuring there is no premature disclosure of acquisition sensitive information to anyone who is not authorized to receive it.

CO Tip: Maintaining the integrity of the process is essential to all concerned and is ultimately the Commanding Officer's responsibility. As part of this responsibility the

Commanding Officer must ensure that no personal communication regarding the procurement takes place with offerors during this period.

10.2 ROLES AND RESPONSIBILITIES

KEY PLAYERS

- **Commanding Officer.**
Monitors schedule for compliance. Appoints the technical evaluation panel, SSB, and SSA (if necessary). If acting as SSA, either approves negotiations or selects best value contractor proposal.
- **Contracting Officer.**
Monitors and manages entire source selection process for compliance with procurement regulations. Convenes technical evaluation panel. Receives and reviews results of technical evaluation. Selects best value proposal, obtains legal review, and then forwards selection to the SSA for approval.
- **Technical Evaluation Panel.**
Receives guidance from contracting officer on technical evaluation criteria. Evaluates technical proposals. Produces technical evaluation reports.
- **Source Selection Board.**
Reviews results of technical evaluation. Submits recommendation to the contracting officer.
- **Source Selection Authority.** Receives SSB recommendation from the contracting officer and makes selection.

ADVISORY PLAYERS

- **Legal Counsel.**
Reviews all source selection documents for compliance with acquisition statutes

and regulations. Provides advice to
Commanding Officer, contracting officer
and SSA.

10.3 CHECKLISTS FOR KEY PLAYERS

Use standard procurement checklists and
forms.

